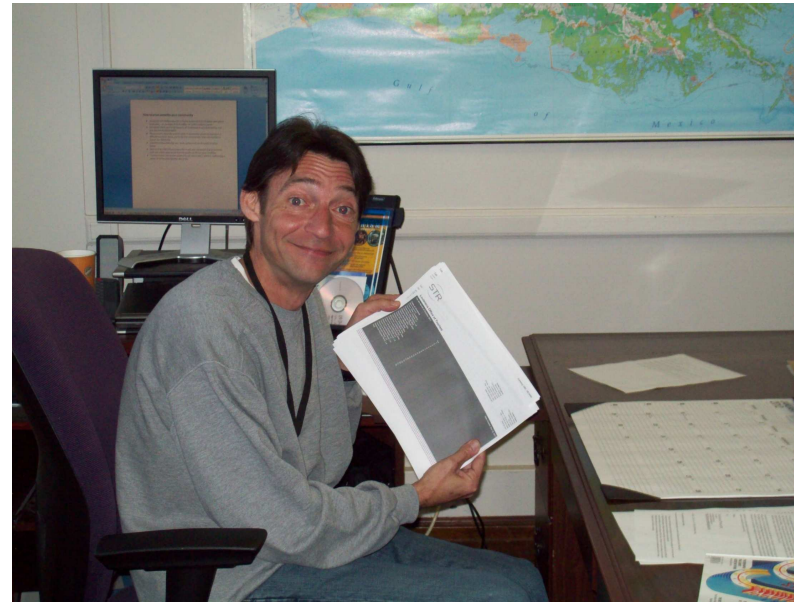




**Louisiana Office of Tourism
Research Section Presents:**

Decoding the Data

**Not everything that can be counted
counts, and not everything that
counts can be counted.**





- ◇ Louisiana's \$9.5 billion tourism industry produces more than \$214.8 million annually in local taxes—an average of \$3.4 million for each Louisiana parish.
- ◇ Tourism creates jobs that are rarely outsourced or relocated to other states.
- ◇ Tourism fosters the preservation of local culture and tradition, reaffirming a sense of community identity and pride.
- ◇ Increased visitor spending supports all businesses in a local economy, not just tourism establishments.

THE LOUISIANA VISITOR

THE LOUISIANA TOURISM ECONOMY



Perceptions of Louisiana

Presentation

1.26.12

Methodology

- Online Survey of Target Traveler
 - 25+, \$50,000+, 2 overnight trips per year

Key Markets

- Atlanta
- Dallas/Ft. Worth
- Houston
- San Antonio
- Memphis

National Markets

- New York
- Los Angeles
- Chicago

Research Objectives



- How is Louisiana perceived as a travel destination?
- What can we do to get visitors to Louisiana?

Choice of Leisure Travel Destination

⇒ How do consumers decide?

How do consumer decide?

■ Selection

- Word of mouth and deals, coupons and offers are #1
- Awareness (buzz) and Opportunity (value) play heavily

■ Planning

- Primarily use Search Engines and Travel Website
- Next , Travel Booking Engines (Expedia and Travelocity)

■ During

- Search engines (Google), Travel Brochures and Guidebooks

What does this mean for you?

■ Use Deal websites



- **Groupon**
- **Living Social**
- **Travel Zoo**

To talk about unique experiences you can offer

Helps promote additional spending beyond the “deal”

Deals help me
“Experience
something that I
would not otherwise
have experienced.”

What does this mean for you?

■ **Focus on Online**

- **Website**
- **Search engines**
- **Booking sites**



Emphasize content around

- Planning trips
- During the trip

■ **Adapt content to mobile devices**



Significant usage of mobile devices while traveling

■ **Continue to provide Printed Materials**



Maps, Brochures, Guidebooks

Choice of Leisure Travel Destination

⇒ What is the impact of advertising?

What is the impact of advertising?

- **Louisiana's advertising has been effective**
 - Most in Regional Markets are aware of advertising
 - Many in Chicago and New York
 - Some in Los Angeles
- **Ad Awareness results in more favorable impact of ads**

What does this mean for you?

- **Continue to advertise**



Increases likelihood to:

1. Seek more information
2. Plan a Trip
3. Lengthen Stay
4. Visit Additional Attractions

Choice of Leisure Travel Destination

⇒ What is the role of Social Media in planning?

What is the role of Social Media in planning?



- **Currently, social media is less important than advertising**
- **Strong influence of word-of-mouth and internet suggests increasing influence in future**
- **Texas and Florida appear to achieve some Social Media success**
 - Texans use Social Media when traveling within state
 - Social Media influences out of state travel to Florida

What does this mean for you?

- Evaluate and Strengthen Social Media strategies



Choice of Leisure Travel Destination

⇒ How do our strengths match destination desires?

How do our strengths match travelers' desires?

- **Louisiana's strengths match up with reasons for destination selection**
 - While Louisiana is widely recognized for its *restaurants that serve superb, local cuisine...*
 - ✓ Dallas, Memphis, Houston and San Antonio are especially likely to select Louisiana for cuisine
 - Several important selection attributes are unknown strengths for Louisiana

What does this mean for you?

- **Continue to talk about our food**



- **Address “Controllable” reasons for selecting other destinations**



1. Visit a particular city
2. Visit an attraction
3. An event
4. Outdoor activities
5. Meet friends

- **Promote less well-known strengths**

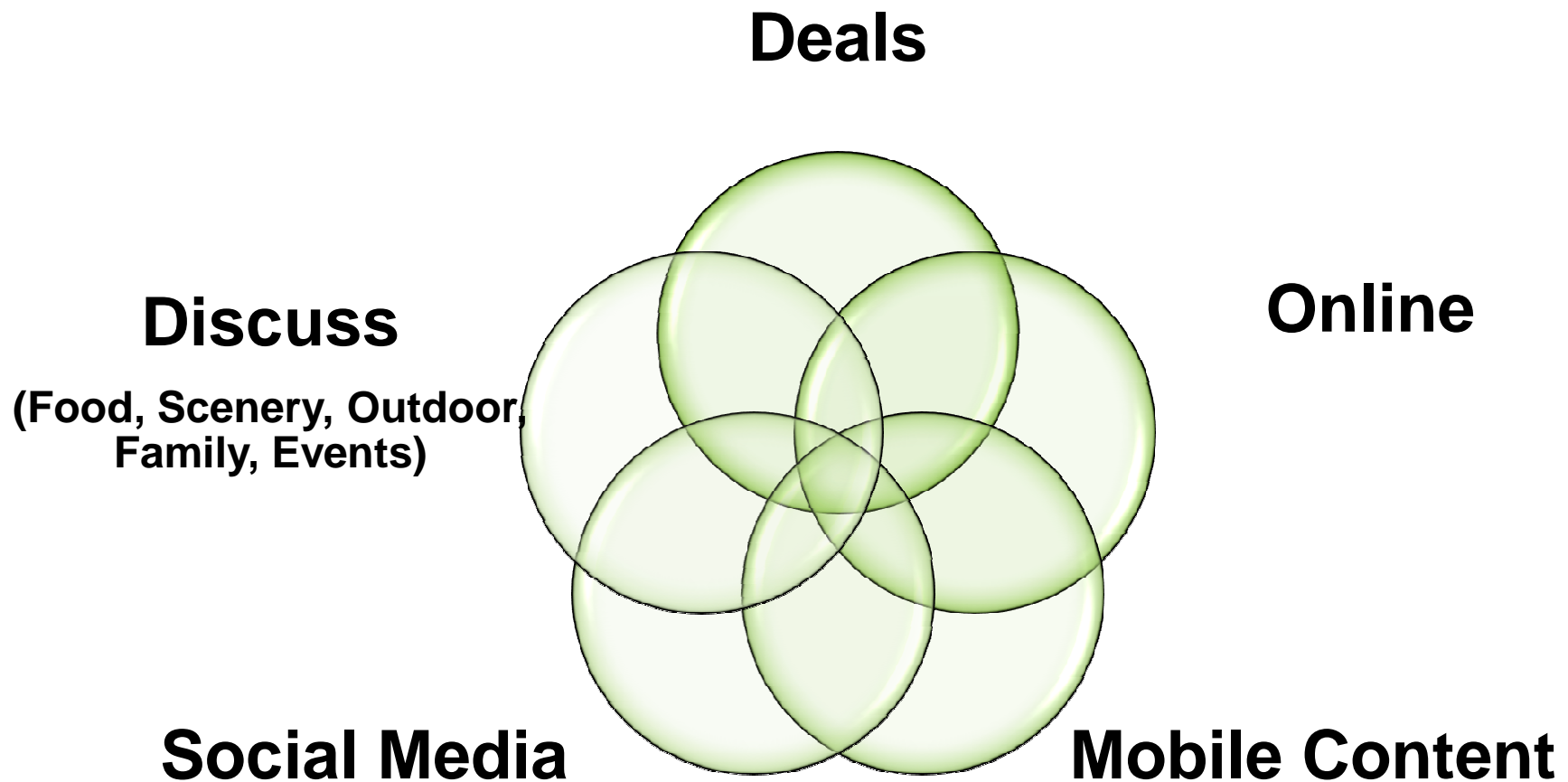


1. Beautiful and Scenic Place
2. Outdoor Activities
3. Family Attractions

Insights and Actions

⇒ What's the takeaway?

What are the Key Takeaways?



Thank you

The Louisiana Visitor

Louisiana Tourism Summit 2012



TNS

World's largest custom
research business

Company owned offices in
over 90 countries

Over 14,500 employees

Largest travel research
practice in the U.S



TravelsAmerica

Visitor profiling study where we ask 5,000+ travelers...

- Visitor Profiles
- Volume Projections
- Trip Characteristics
- Origin Markets.

US Travel Association Endorsement

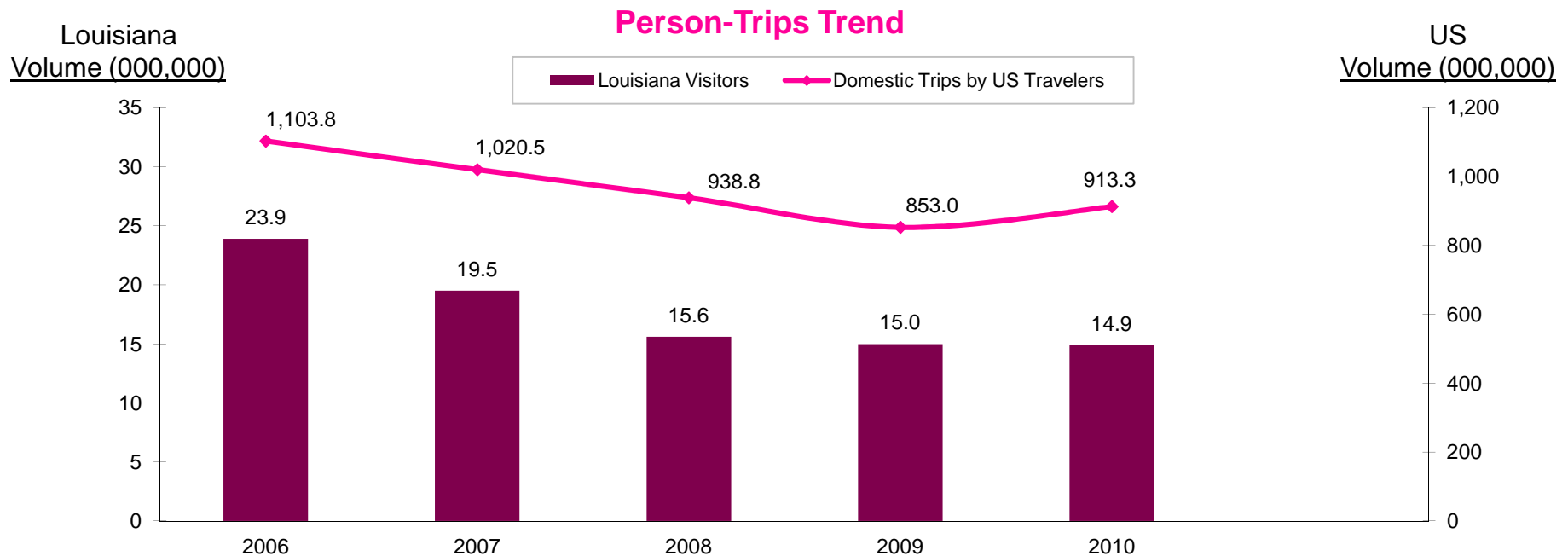
“Following an exhaustive review of vendors that provide trip and traveler characteristics of domestic travelers, U.S. Travel has entered into a multi-year contract with TNS as its official research vendor of record”.

US Travel Association

Recent Louisiana volume compared to US

Louisiana's decline from prior years almost stops

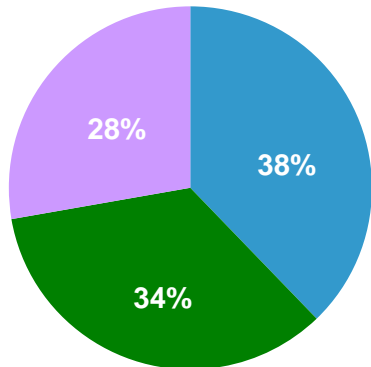
- Domestic trips by US travelers begin to reverse its steady decline since 2006
- Louisiana visitation stabilizes
- Unlike US travel, with most trips occurring in Q3 (July-September), Louisiana draws a large share of visitors in the shoulder seasons (April - June; October - December).



Relative size of key segments

Market relevance

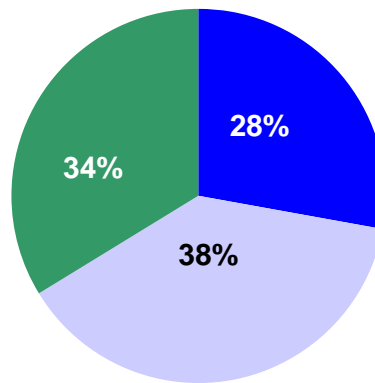
By Source



■ Louisiana ■ High BDI ■ Elsewhere

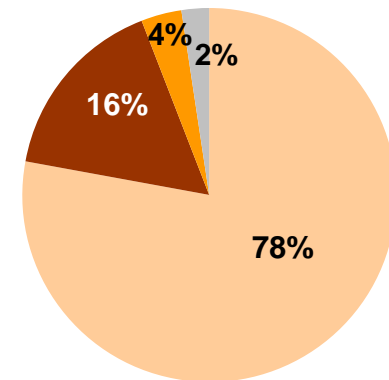
Proportion of Louisiana Visitors by Segment

By Age (Mature = 55+)



■ Under 35 ■ 35 - 54 ■ 55+

By Ethnicity



■ White ■ AA* ■ Hispanic ■ Other

* African-American

Louisiana's Business Development Index – Top 15

Louisiana's High BDI Marketing Area

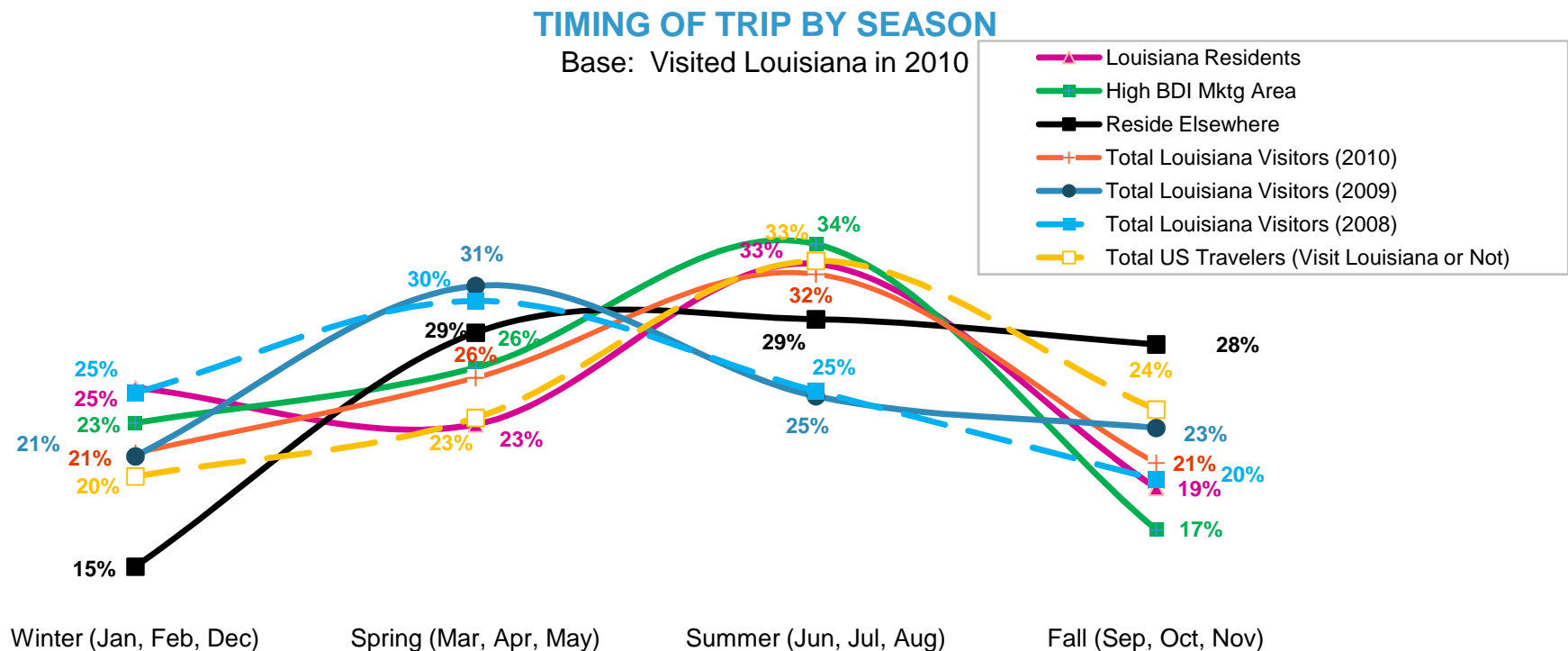
DMA of Origin	High BDI Index
Biloxi-Gulfport, MS	2153
Tyler-Longview (Lufkin & Nacogdoches), TX	1027
Abilene-Sweetwater, TX	887
Beaumont-Port Arthur, TX	879
Jackson, MS	808
Hattiesburg-Laurel, MS	724
Mobile-Pensacola (Ft. Walton Beach), AL-FL	488
Greenwood-Greenville, MS	356
Houston, TX	346
Waco-Temple-Bryan, TX	336
Victoria, TX	330
Corpus Christi, TX	316
Montgomery-Selma, AL	269
Orlando-Daytona Beach-Melbourne, FL	246
Dallas-Ft. Worth, TX	234

Trip timing

Nationally, most travel occurs in Summer

In contrast to prior years when Spring led other seasons:

- 2010 Louisiana travel peaks in the Summer for both Louisiana residents and the High BDI Marketing Area
- However, those traveling from “Elsewhere” come at about the same rate from Spring through Fall; only the Winter shows a dip.



The LA Visitor

- They are affluent over \$60K income
- Average age 47
- Well educated 45% College Degree
- Three quarters drive
- Over 40% plan trip within two weeks of traveling
- Nearly 40% travel to visit friends/family and relatives
- White 78% and 16% African Americans
- They take 4 trips a year
- And lastly they stay in hotels/casinos approximately 50%

The New Normal ...Your Profiles

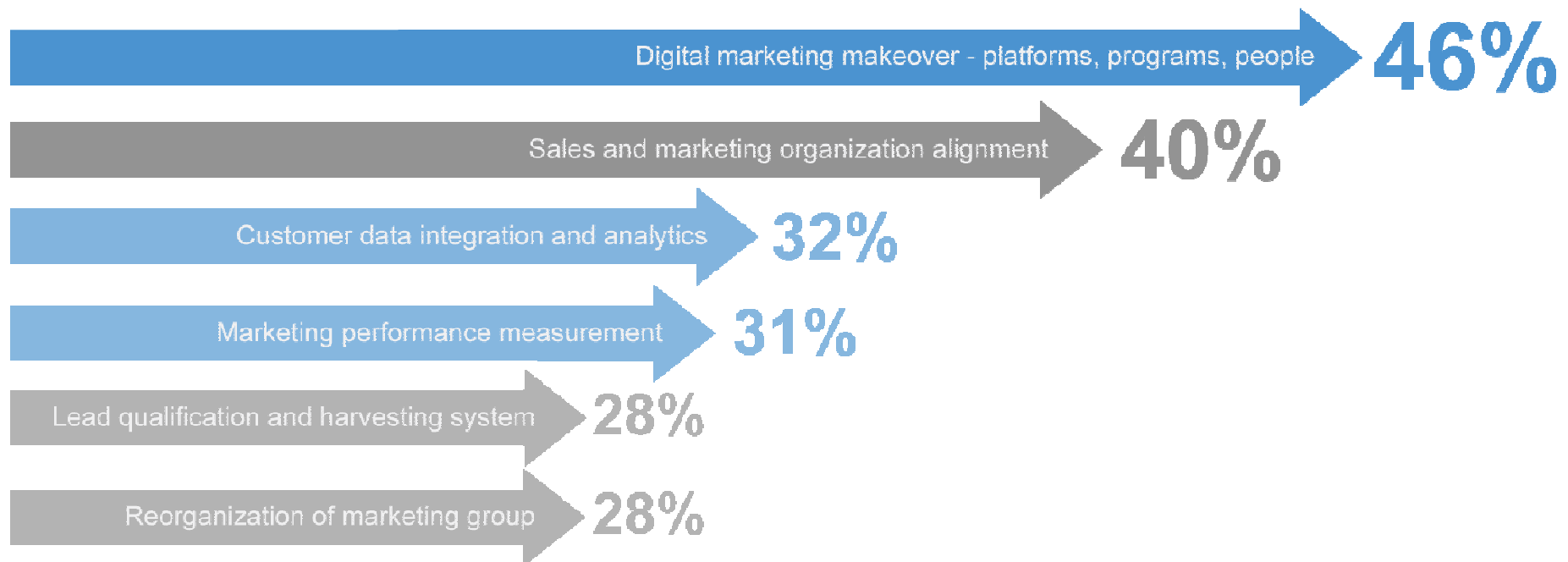
- Their Risk Attitudes
- Their Digital Life

Digital Life

- What is your digital landscape?
- How to engage?
- How to build brand advocates?
- What is the path to purchase?

Digital is firmly on the agenda of the world's CMOs

Top Transformation Projects in the Office of the CMO:





Digital lifestyles



Influencers

INFLUENCERS

The internet is an integral part of my life



Communicators

COMMUNICATIONS

I just love talking and expressing myself



Knowledge-Seekers

KNOWLEDGE-SEEKERS

I use the internet to gain knowledge, information and to educate myself



Networkers

NETWORKERS

The internet is important for me to establish and maintain relationships



Aspirers

ASPIRERS

I'm looking to create a personal space online



Functionals

FUNCTIONALS

The internet is a functional tool





Most categories skew higher for Influencers, the Digital Life segment that tends to spend the most online and skew higher for Social sites.



Digital Life Segments: Opportunity Sizing by Product Category



	Total US	Books	Music	Movies	Computers	Software	Mobile Phone	Mobile Gadget	Audio/ Visual	Home Appliances	Cosmetics	Skin Care	Hair care	Cars/ Bikes	Credit Cards	Financial Services
Functionals	22%	19%	19%	20%	22%	18%	18%	15%	16%	18%	17%	19%	15%	19%	14%	19%
Aspirers	4%	3%	2%	1%	1%	1%	2%	1%	2%	2%	3%	3%	5%	1%	2%	1%
Knowledge-seekers	16%	17%	15%	18%	19%	18%	17%	19%	23%	19%	18%	15%	17%	18%	19%	18%
Communicators	11%	12%	12%	11%	12%	13%	10%	8%	9%	7%	7%	7%	8%	10%	13%	11%
Influencers	20%	18%	23%	22%	26%	24%	29%	39%	34%	41%	24%	27%	30%	36%	28%	30%
Networkers	27%	31%	30%	28%	20%	25%	24%	18%	16%	14%	32%	30%	26%	18%	25%	21%
	n= 1,507	n= 696	n= 644	n= 617	n= 391	n= 494	n= 292	n= 184	n= 217	n= 165	n= 280	n= 278	n= 215	n= 150	n= 254	n= 261

Audio, ISP Services and Real Estate categories skew higher for **Knowledge-Seekers** thus are more apt to seek knowledge and educate themselves online

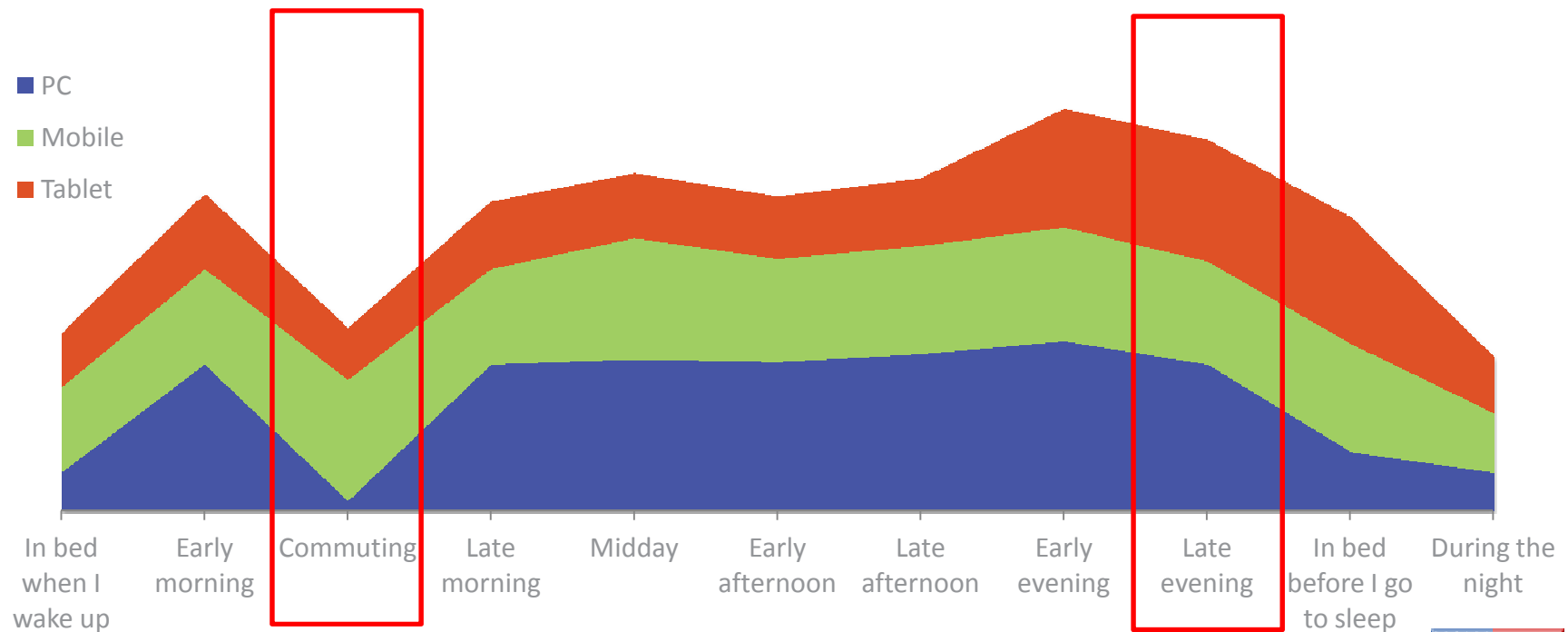
	Total US	Holiday/ Travel	Food	Alcohol	Clothes	Shoes	ISP Services	Cleaning Products	Baby Care	Video Games	Interior Decoration	Perfume	Real Estate	Pet Food	Tobacco
Functionals	22%	22%	17%	10%	20%	17%	17%	19%	15%	14%	17%	17%	14%	17%	10%
Aspirers	4%	3%	0%	3%	2%	2%	3%	0%	2%	3%	1%	2%	2%	1%	2%
Knowledge-seekers	16%	16%	16%	17%	16%	16%	23%	20%	17%	19%	15%	16%	24%	19%	15%
Communicators	11%	11%	9%	10%	9%	10%	11%	9%	6%	12%	5%	11%	5%	11%	10%
Influencers	20%	18%	35%	48%	21%	26%	27%	34%	38%	27%	38%	29%	45%	35%	44%
Networkers	27%	32%	23%	13%	31%	30%	20%	17%	22%	24%	24%	25%	11%	16%	20%
	n= 1,507	n= 671	n= 248	n= 79	n= 666	n= 450	n= 320	n= 156	n= 111	n= 377	n= 203	n= 205	n= 89	n= 112	n= 91

= five percentage points or more higher than total US
 = five percentage points or more lower than total US



Understanding digital behaviors unlocks the possibility for more effective media planning

I feel I am 'always connected' to the Internet 74%



Digital Life

© TNS 2011

© TNS 2011

4040

Emerging markets look to the mobile as their primary device for many activities

Preferred devices for activities



Prefer PC



Prefer Mobile

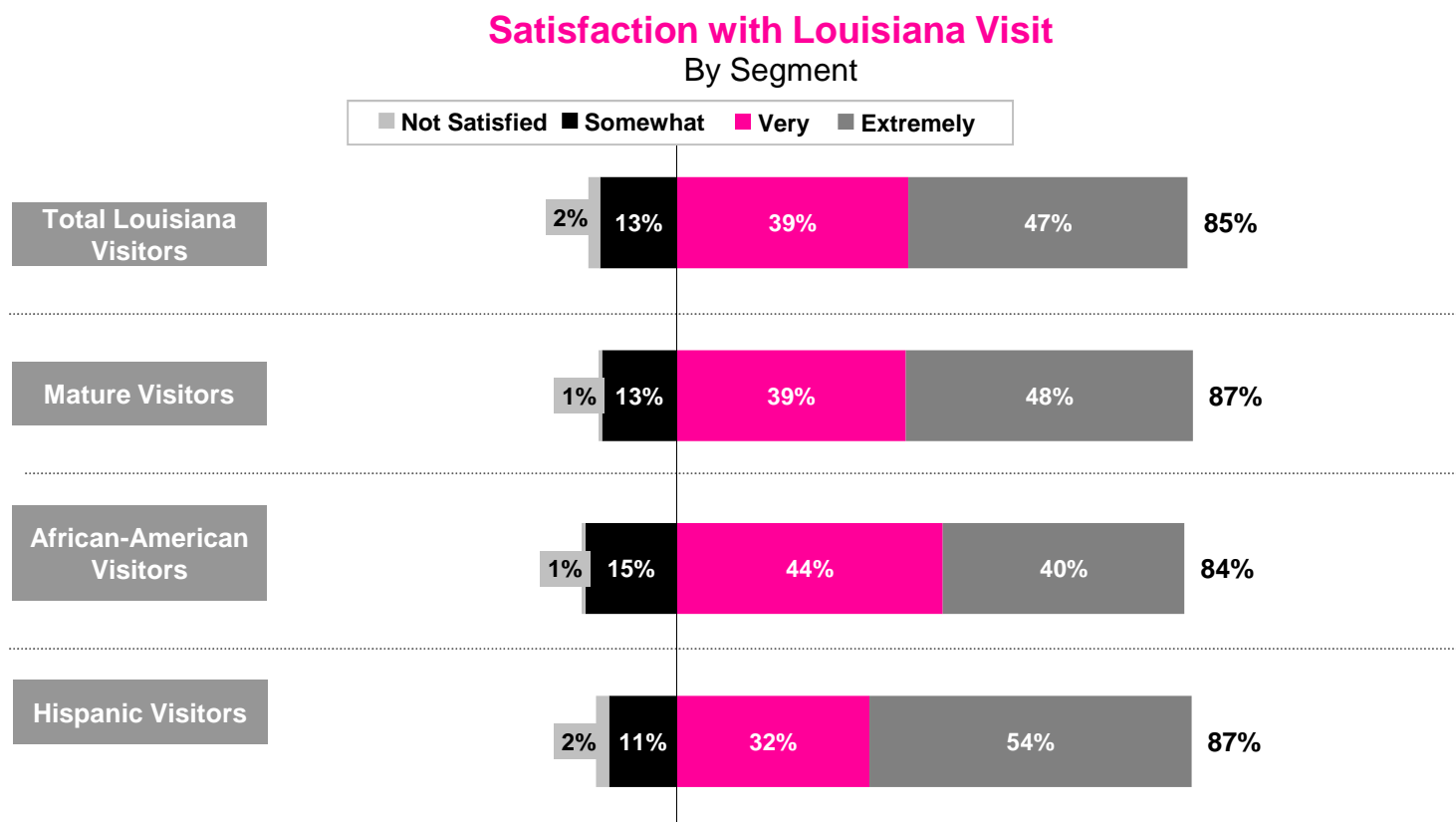


Prefer tablet

	N America	Europe	Dev Asia	Lat Am	China	MENA	Emerg Asia	India	SSA
Digital music	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile
Calendar	Prefer PC	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile
Navigation	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer PC	Prefer Mobile
Transfer files	Prefer PC	Prefer Mobile	Prefer PC	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile
Bluetooth	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile
Games	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile	Prefer PC	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile
Video calling	Prefer PC	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer PC	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer Mobile
IM	Prefer Mobile	Prefer Mobile	Prefer Mobile	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile
Internet access	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile	Prefer Mobile	Prefer Mobile
Download content	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile	Prefer Mobile
Download apps	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile
Email	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC
Banking	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile
Edit images and videos	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile	Prefer PC
Read eBooks	Prefer tablet	Prefer tablet	Prefer tablet	Prefer PC	Prefer Mobile	Prefer PC	Prefer PC	Prefer PC	Prefer PC
Browse the Internet	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC
Social networking	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer Mobile
Edit documents	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC
Online shopping	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC	Prefer PC

Satisfaction with Louisiana by segment

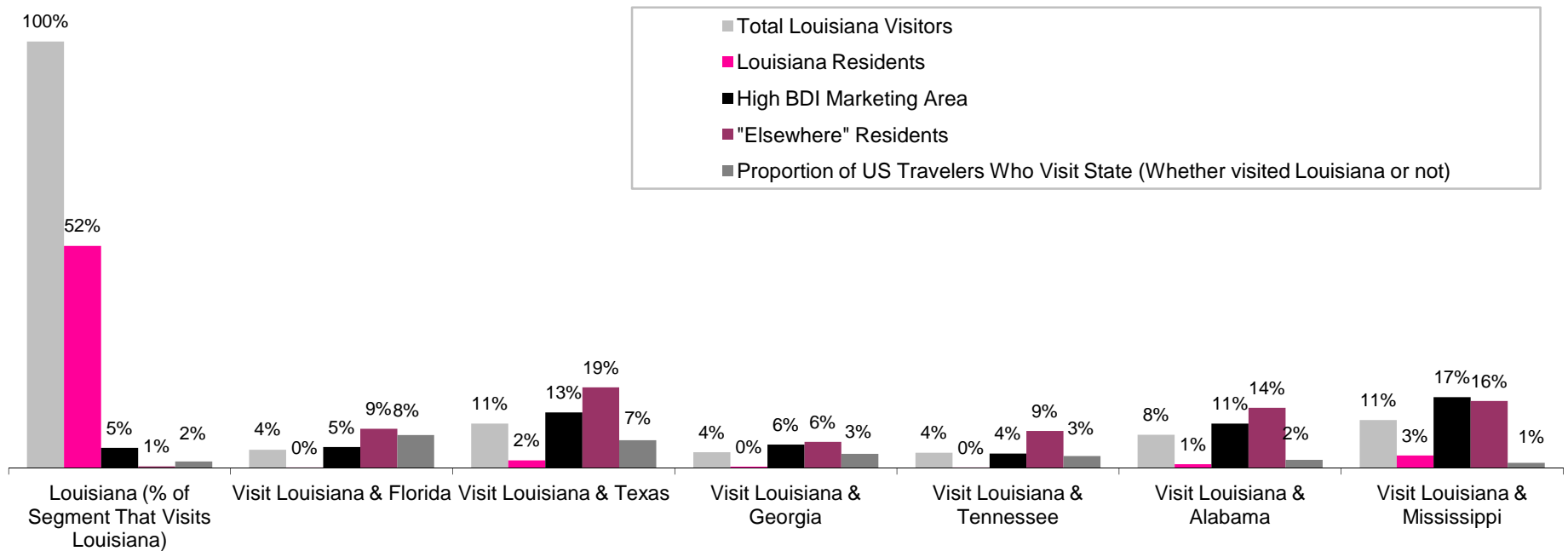
Satisfaction is also quite strong across key segments



Key competitors to Louisiana (among Louisiana visitors)

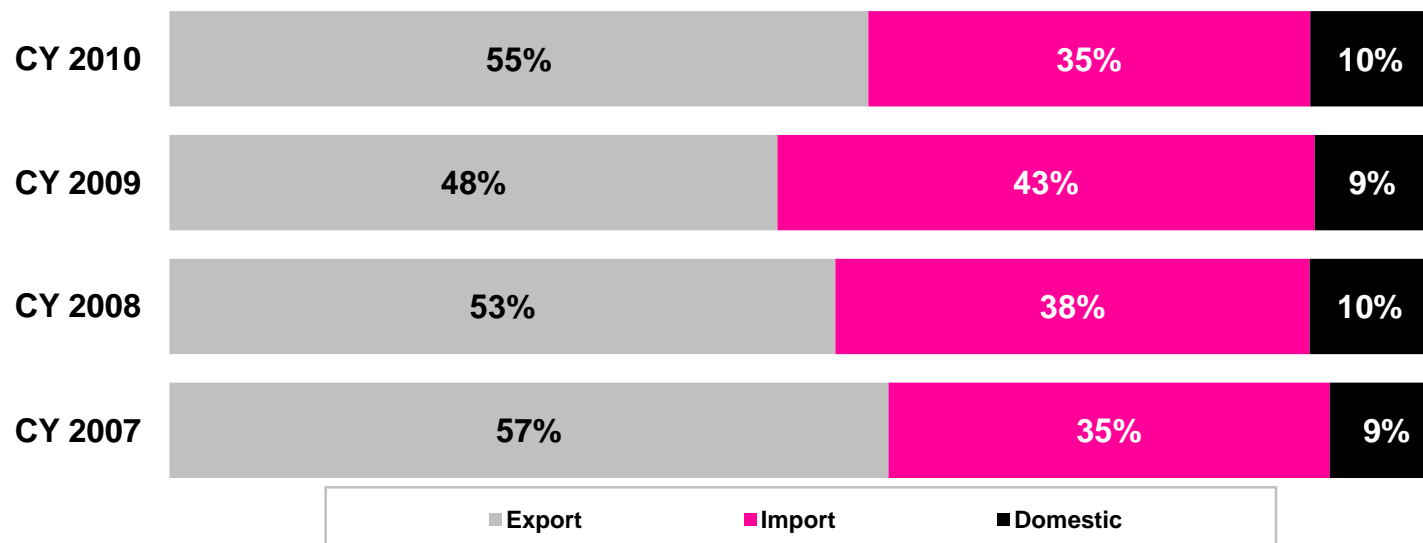
Louisiana primarily shares visitors with TX, AL, and MS

Proportion of Louisiana Visitors Also Visiting Competitive States (5%+)
(Past month, whether on same trip or not)



Export/Import

“Balance of Trade”



Export represents \$ coming into Louisiana (Non-LA residents coming to LA)

Import represents \$ leaving Louisiana (LA residents traveling elsewhere)

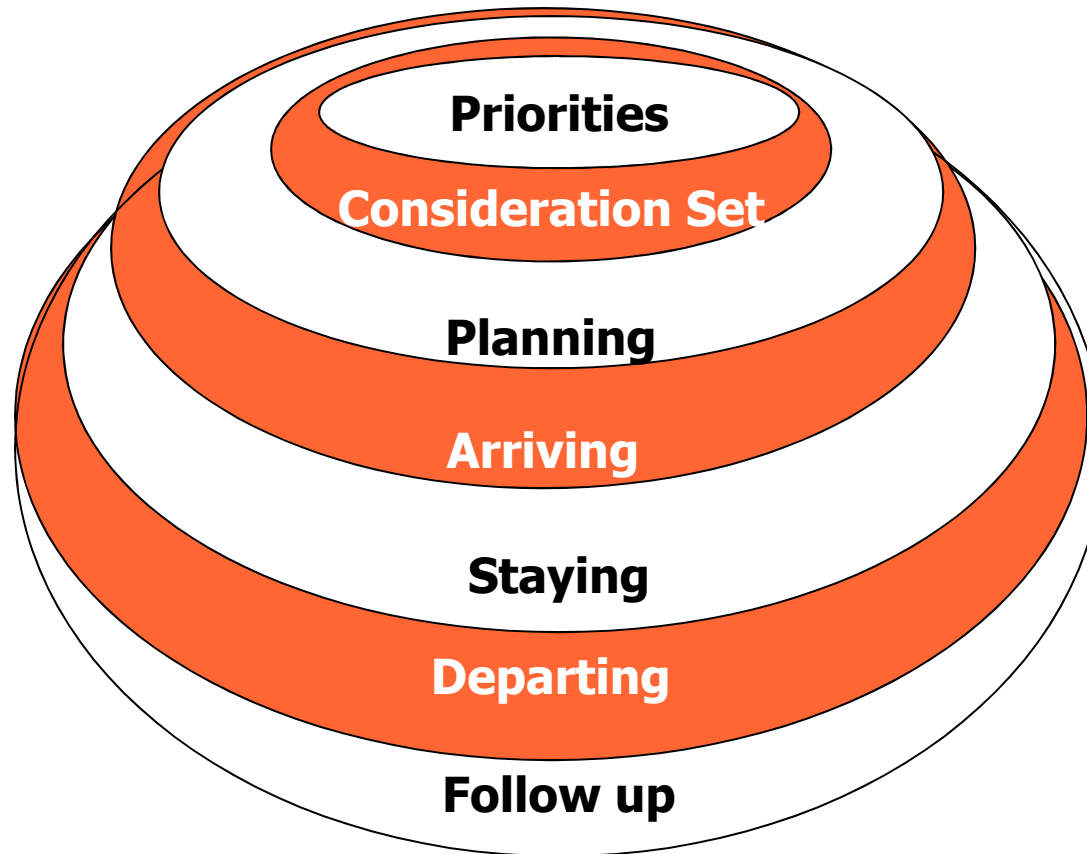
Domestic represents \$ staying in Louisiana (LA residents spending within LA)

Your marketing plans and new opportunities!

- Digital
- Origin Markets
- Segments
- Sizing or scorecards
- The Trip

The Trip

Are you winning
with every trip aspect?



Thank You!



the sixth sense of business™

**Please direct responses and
clarifications to:**

John Packer

E-mail: John.Packer@tnsglobal.com

Phone: (513) 345-2066





2010 Tourism Satellite Account

LOUISIANA
Pick your Passion



The Louisiana Tourism Satellite Account

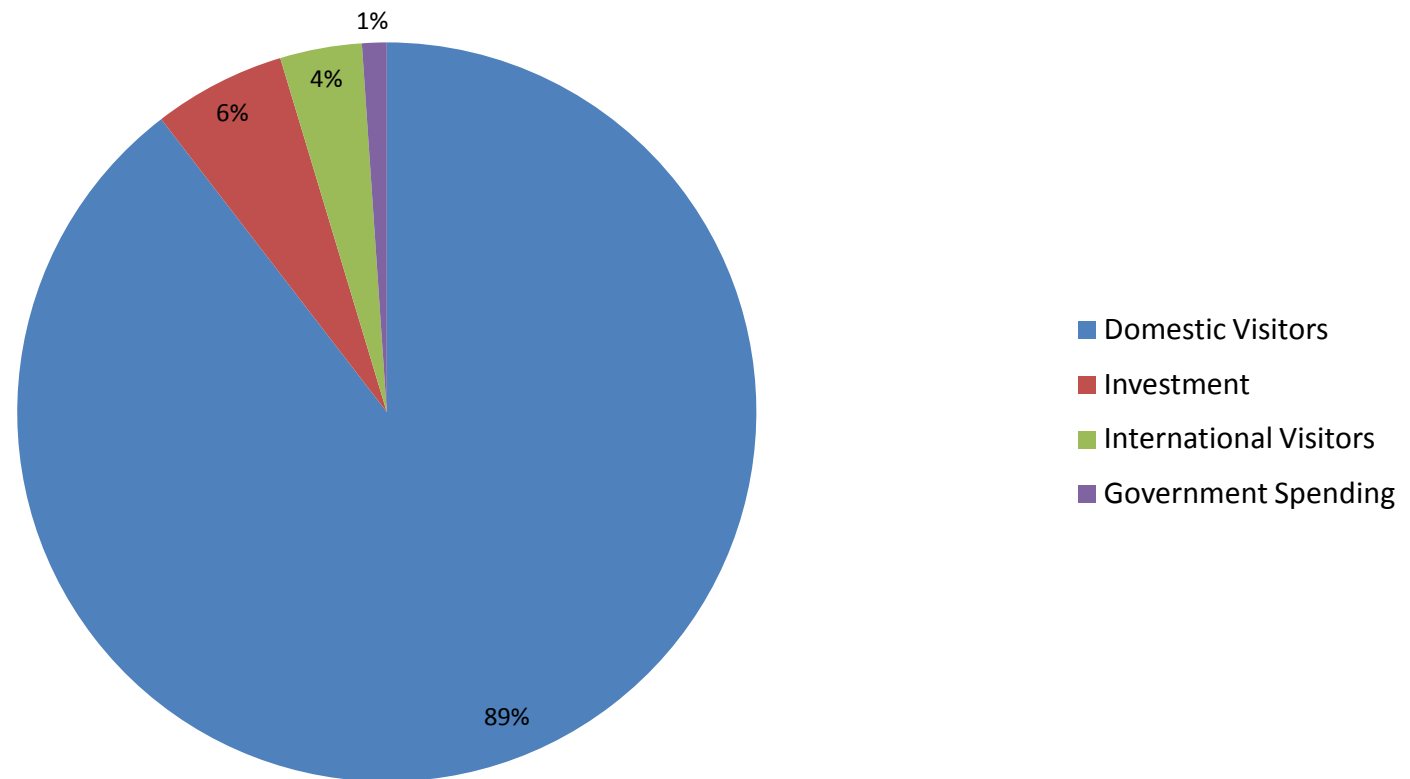
- Why is Travel and Tourism important?
- Purpose of the TSA
- How important is Travel and Tourism to Louisiana?



The Inputs

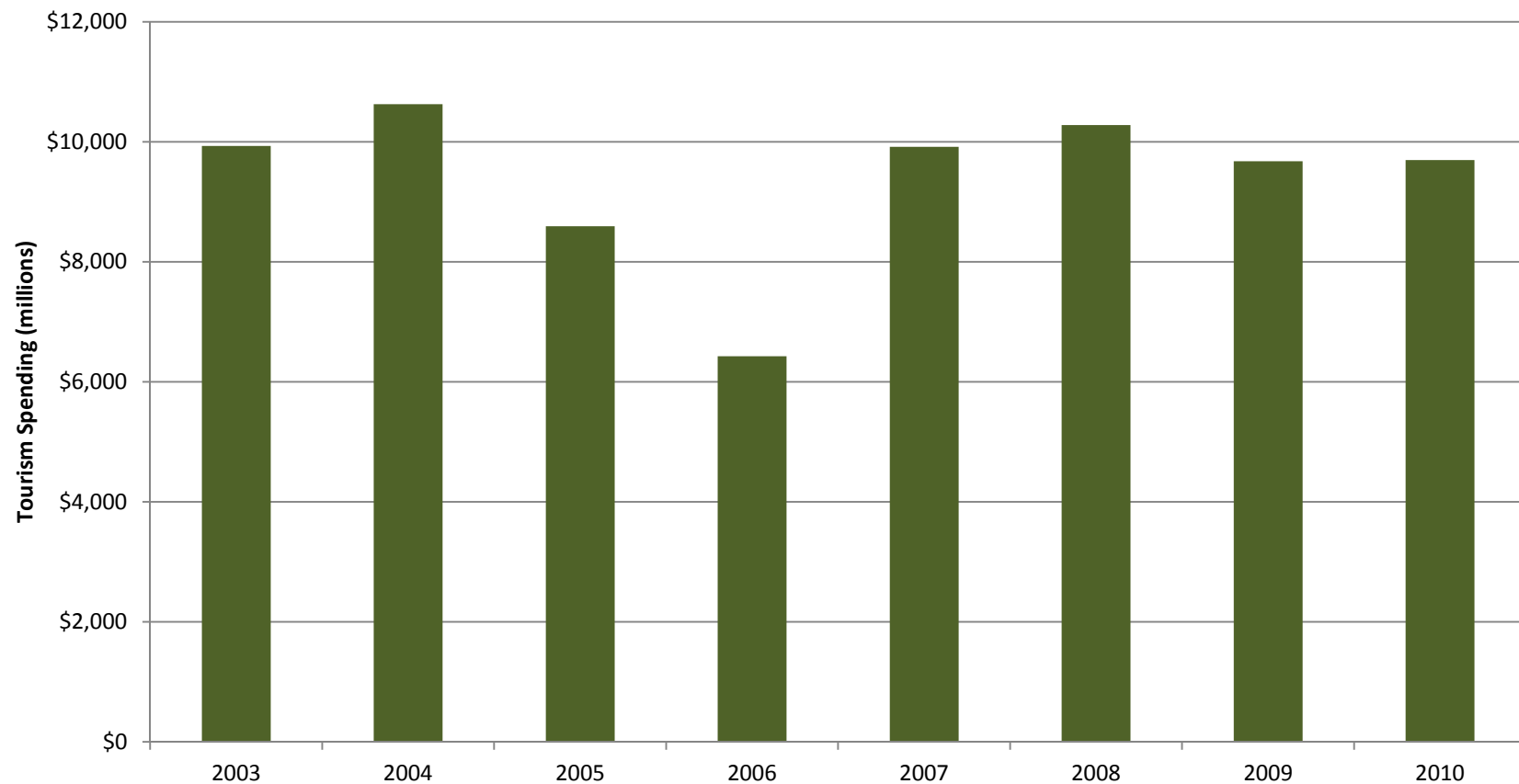


2010 Tourism Expenditures (\$millions)





Total Tourism Spending (\$millions)





Quantifying the Importance of Tourism in the Louisiana Economy



Direct Employment

Rank	Industry	Employment
1	Health Care & Social Assistance	285,506
2	Retail Trade	218,423
3	Educational Services	171,066
4	Accommodation & Food Services	165,978
5	Manufacturing	137,281
6	Construction	131,699
7	Travel & Tourism	128,050
8	Public Administration	104,024
9	Administrative And Waste Services	91,307
10	Professional And Technical Services	82,248
11	Transportation And Warehousing	74,671
12	Wholesale Trade	70,377
	All Others	301,309
	Total	1,833,887



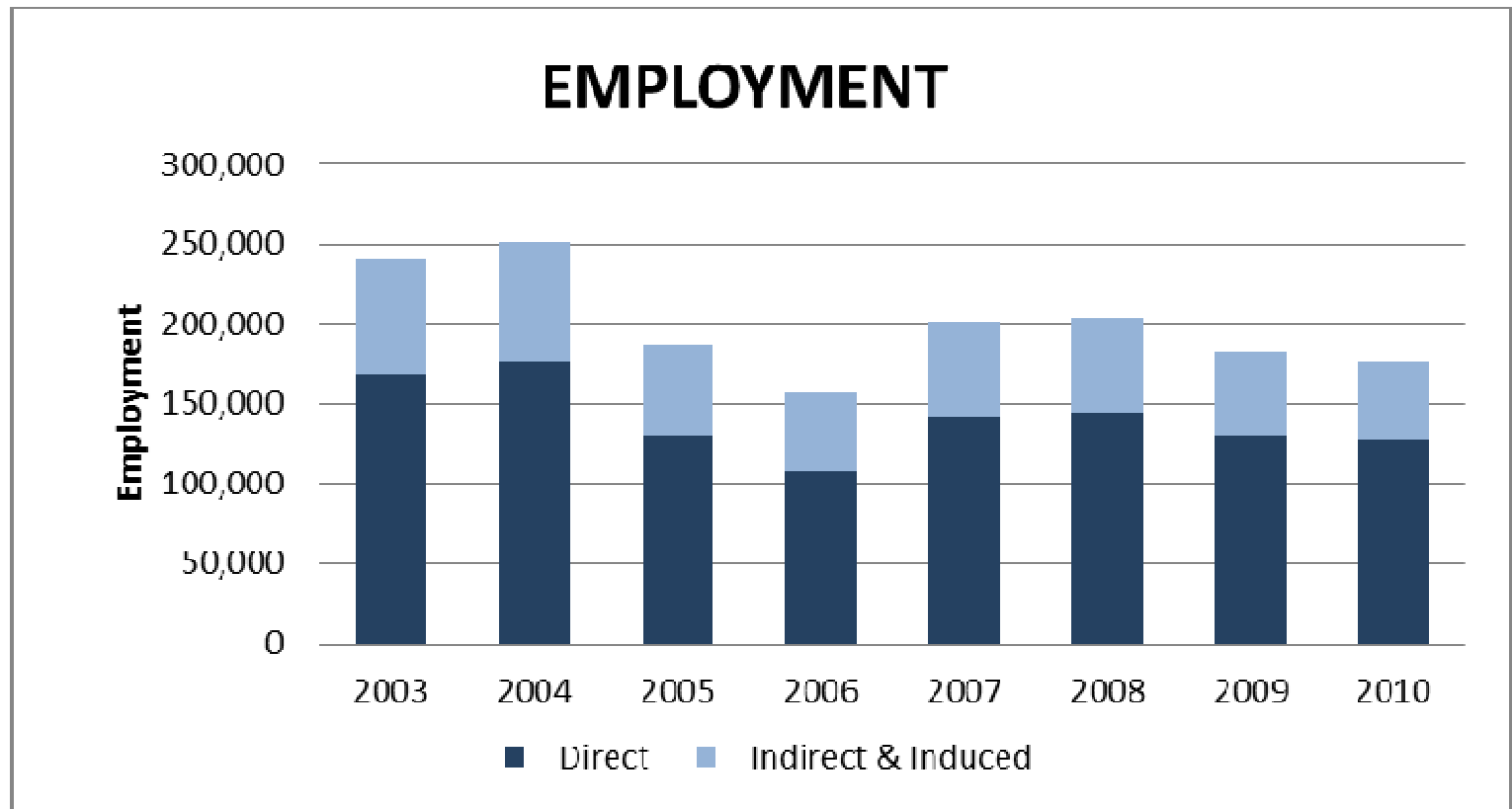
Where are these jobs?



Rank	Industry	Direct Employment	% of T & T	State Employment
1	Food Svcs & Drinking Places	36,121	28.2%	138,820
2	Repair & Maintenance	14,854	11.6%	19,791
3	Accommodations	12,956	10.1%	27,158
4	Amusement- Gambling & Recreation	10,870	8.5%	29,493
5	Gasoline Stations	7,648	6.0%	18,442
6	General Merch Stores	6,748	5.3%	52,280
7	Construction	6,236	4.9%	131,699
8	Transit & Ground Passengers	5,136	4.0%	3,412
9	Misc Retailers	4,584	3.6%	10,710
10	Food & Beverage Stores	4,515	3.5%	35,771
	All Other	18,381	14.4%	1,366,313
	Total	128,050	100.0%	1,833,888



The Multiplier Effect





State Tax Revenues attributable to Travel and Tourism

Revenue Category	Visitor Taxes (\$Millions)	% in category	State Total (\$Millions)	% of State Total
Alcohol Beverage	\$0.6	0.1%	\$19.7	3.1%
Beer Tax	\$1.1	0.1%	\$35.8	3.1%
Gasoline Tax	\$122.9	16.5%	\$588.0	20.9%
Auto Rental Excise	\$4.2	0.6%	\$5.2	81.3%
Sales Tax	\$220.0	29.5%	\$2,762.5	8.0%
Corporate Income Tax	\$22.0	2.9%	\$612.5	3.6%
Individual Income Tax	\$74.0	9.9%	\$2,966.1	2.5%
Motor Vehicle Licenses	\$2.6	0.4%	\$106.1	2.5%
Landbased Casino	\$20.3	2.7%	\$81.9	24.7%
Video Draw Poker	\$54.5	7.3%	\$212.1	25.7%
Riverboat Gaming	\$191.7	25.7%	\$374.8	51.2%
Ractrack Slots	\$32.1	4.3%	\$62.1	51.7%
Total*	\$745.9	100.0%	\$8,918.8	8.4%



Other Key Findings

- \$6.1 billion of Louisiana gross domestic product (2.8%) is was directly attributable to travel and tourism
- 67 cents of every dollar spent in tourism stays in the Louisiana economy

Indicators of Louisiana Tourism Trends and Relevance for Your Area

Janet F. Speyrer, Ph.D.

Co-Director, Hospitality Research Center and

Associate Dean for Research

College of Business Administration

The University of New Orleans



THE UNIVERSITY of
NEW ORLEANS

HOSPITALITY
RESEARCH CENTER

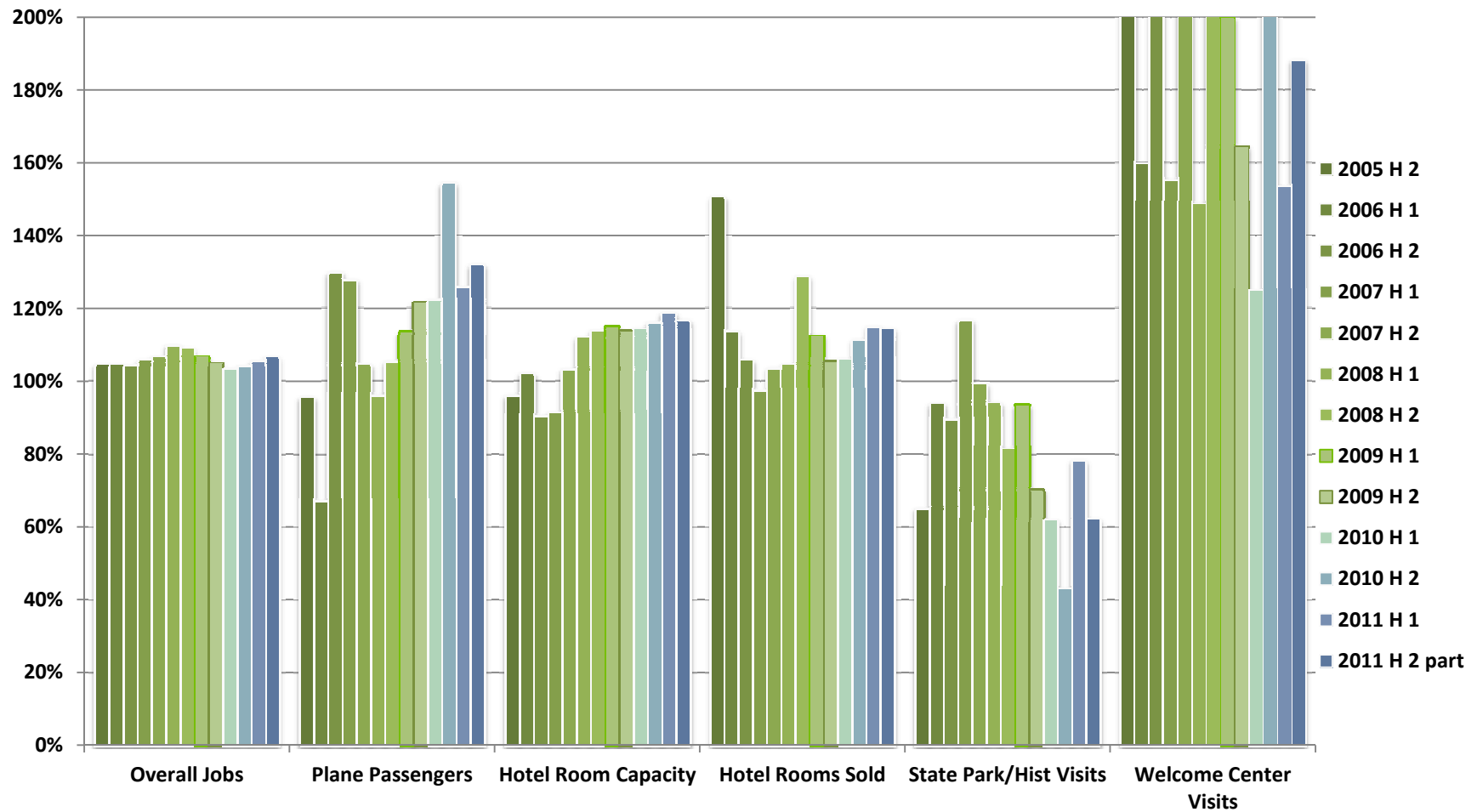
Defining Tourism Opportunities

LOUISIANA
Pick your Passion

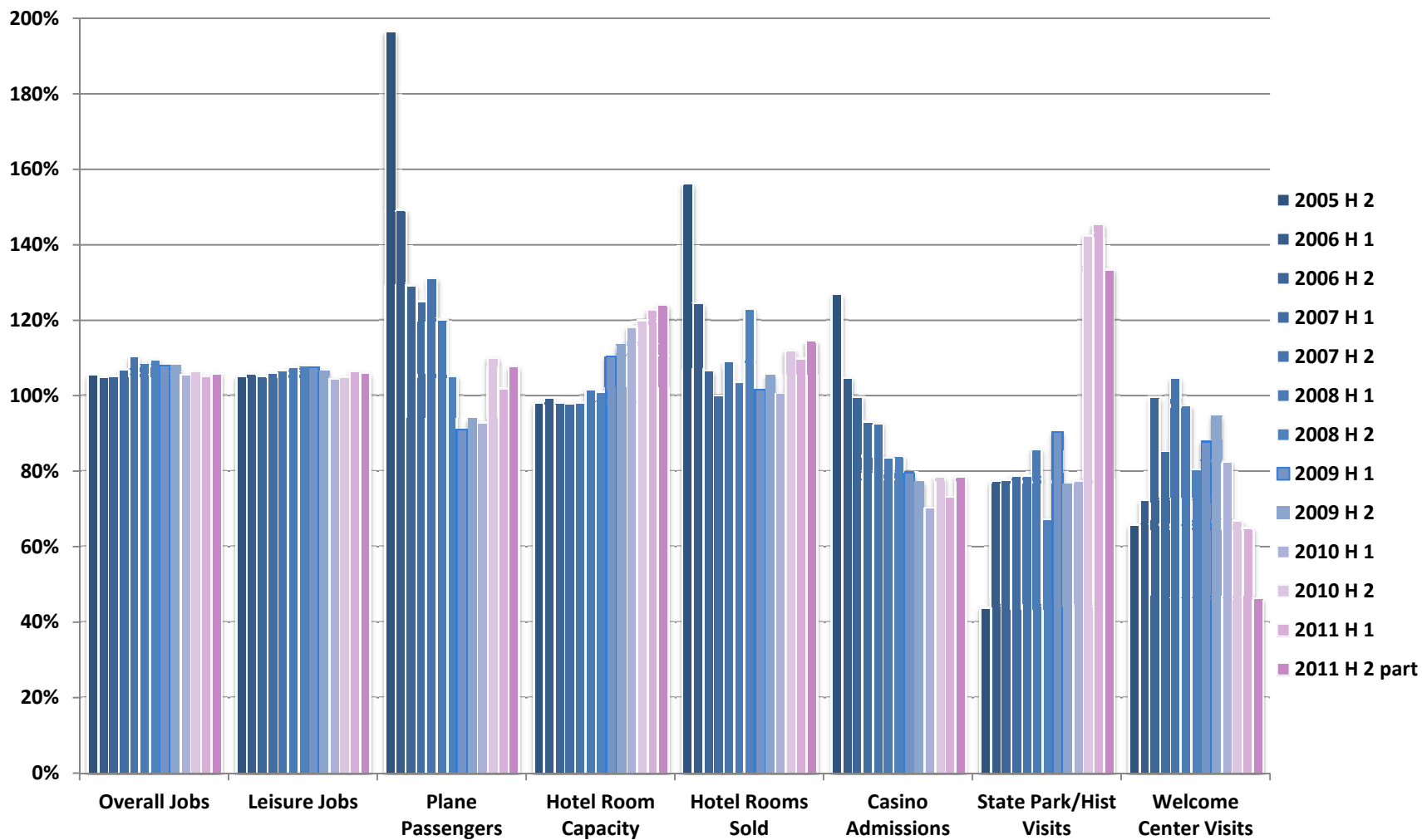
Tourism Indicators

- Overall Jobs
- Leisure and Hospitality Jobs
- Plane Passengers
- Hotel Capacity
- Hotel Rooms Sold
- State Park and Historic Site Visitation
- Welcome Center Visitation
- Casino Admissions
- Other Information as available

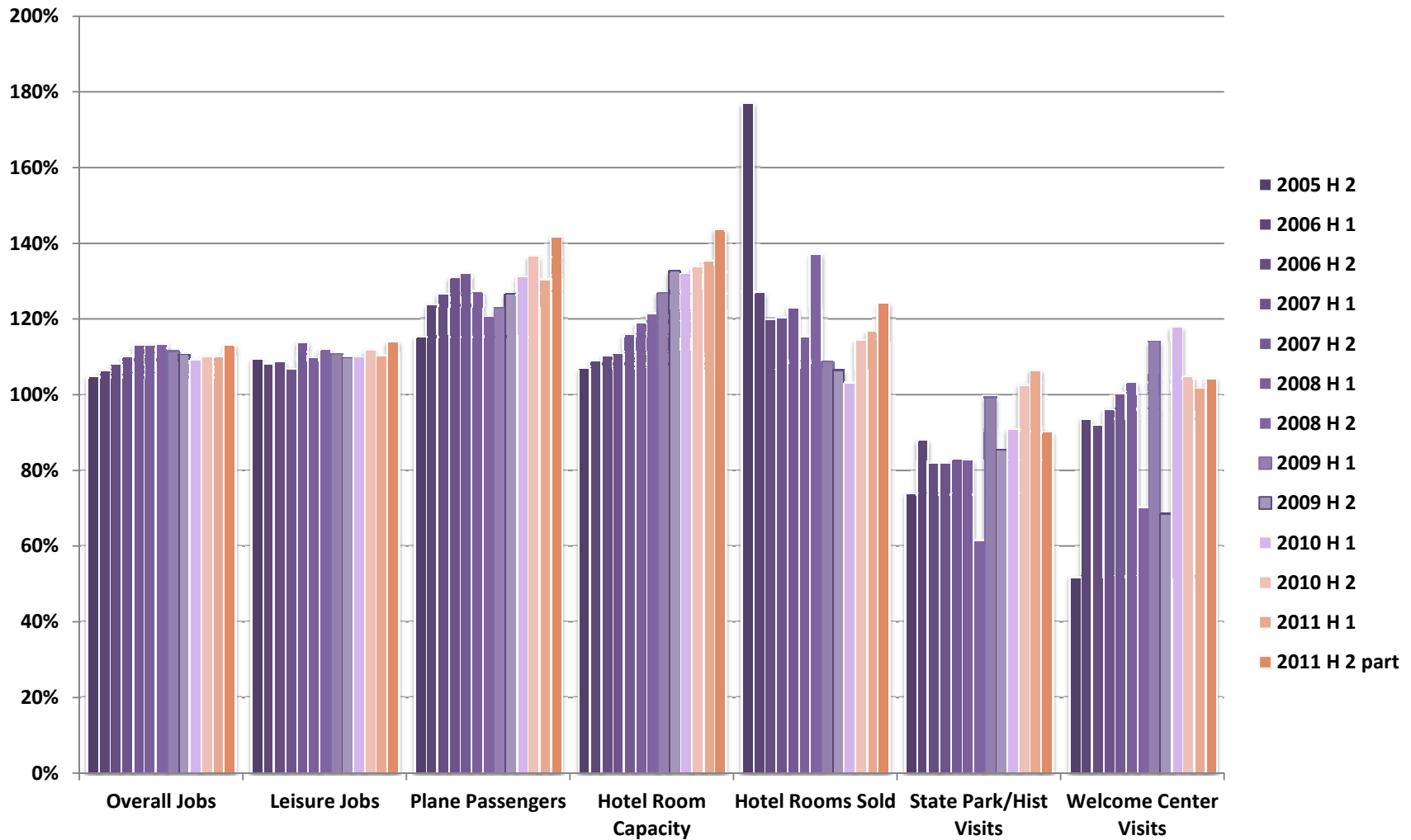
Alexandria Half Year Trends



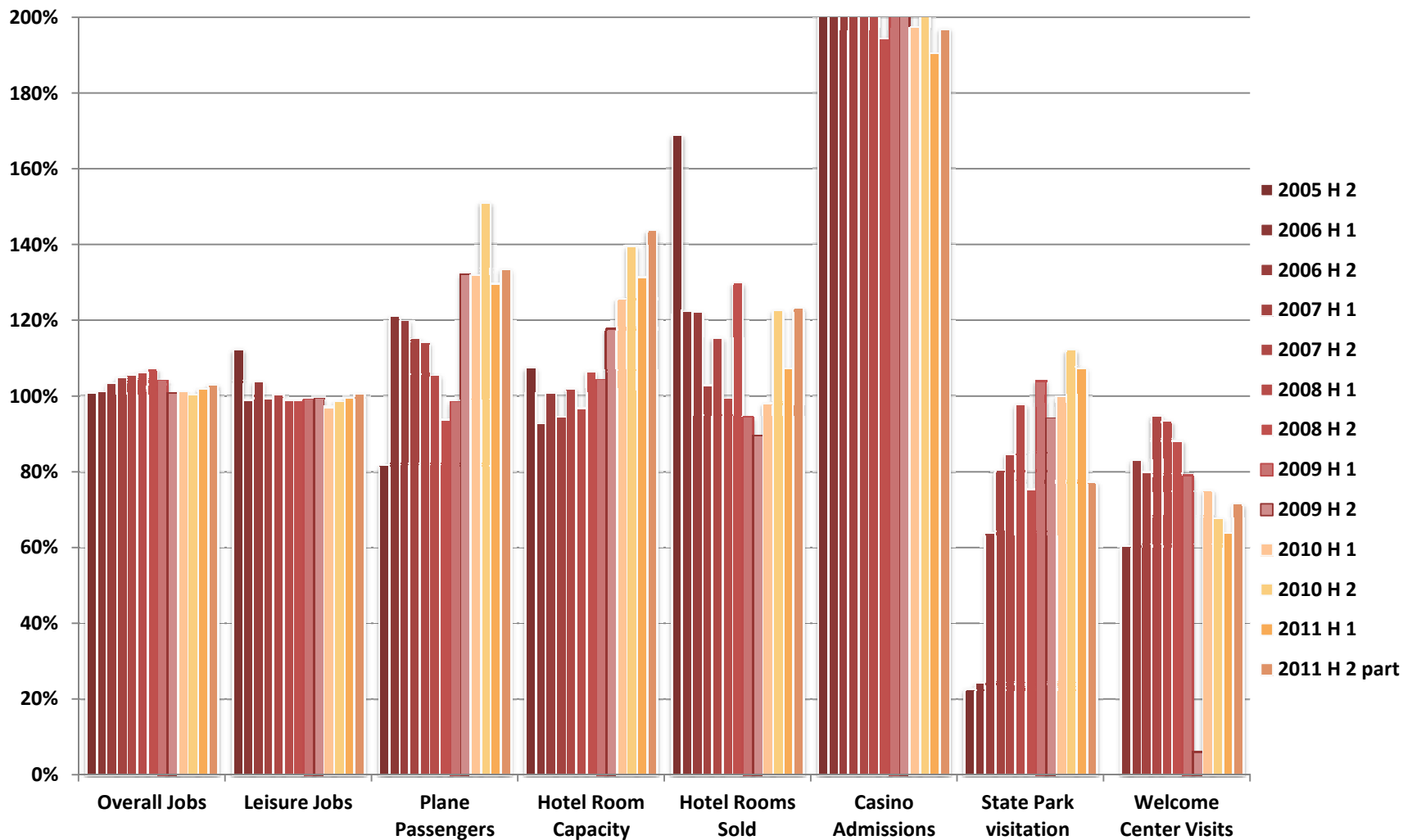
Baton Rouge Half Year Trends



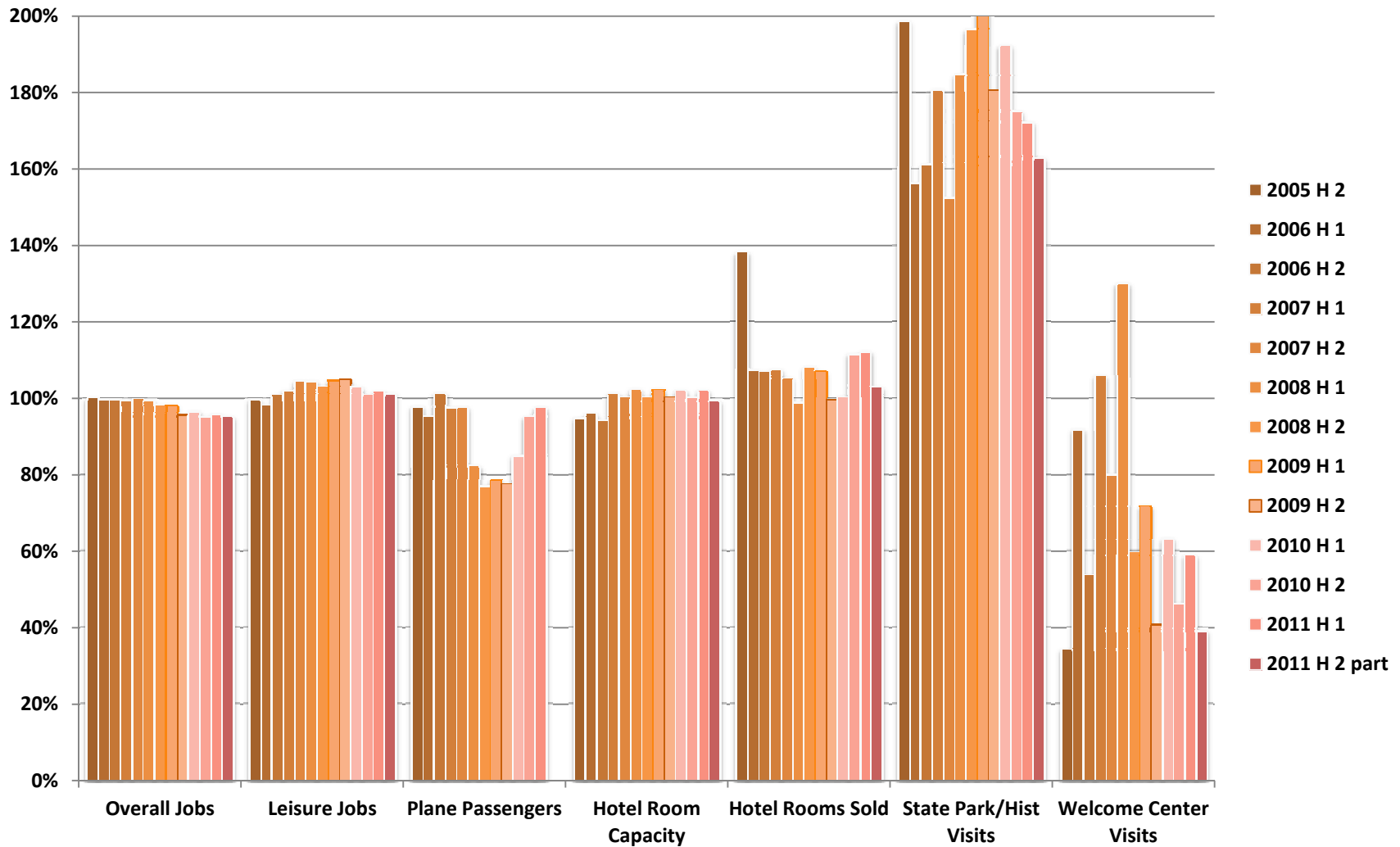
Lafayette Half Year Trends



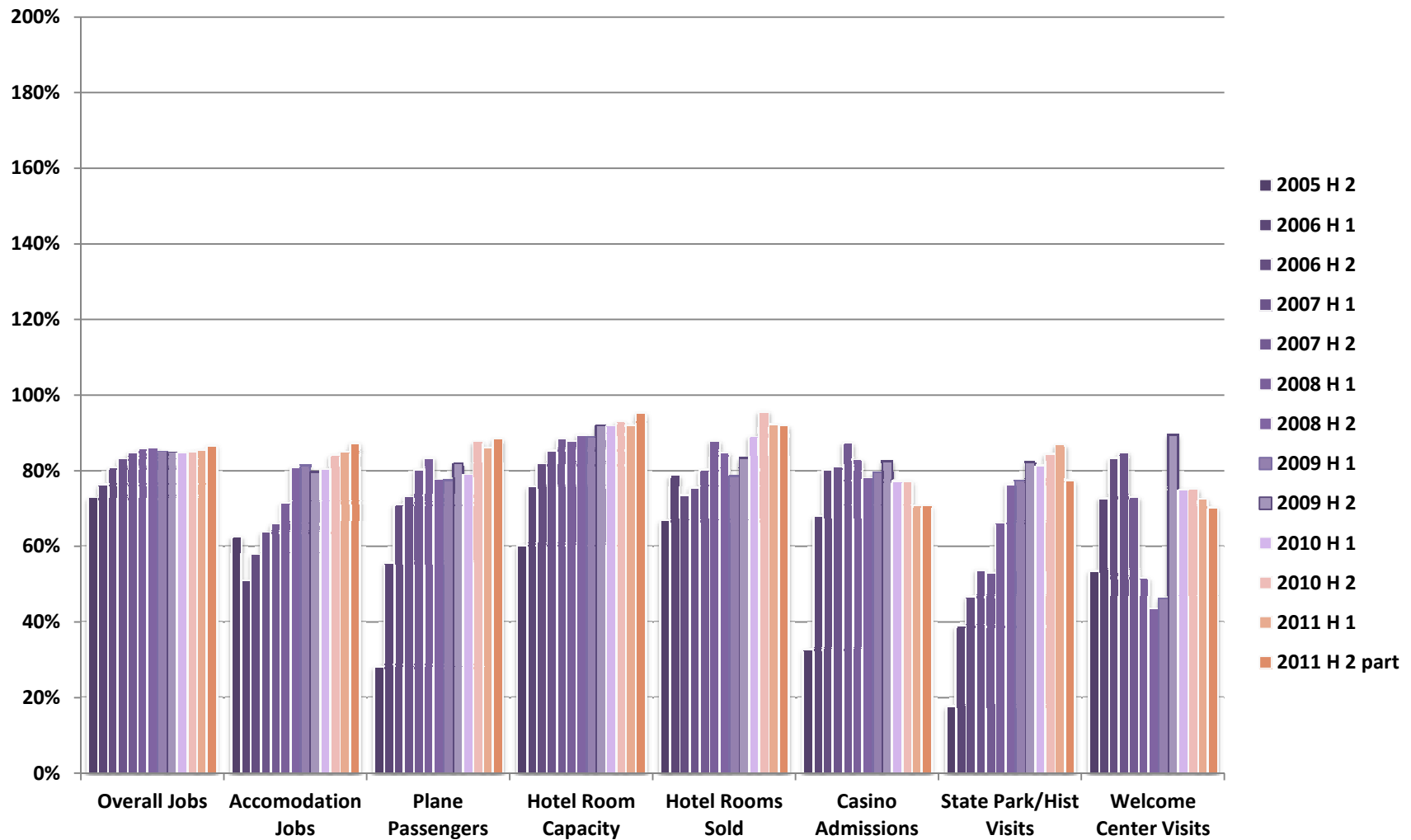
Lake Charles Half Year Trends



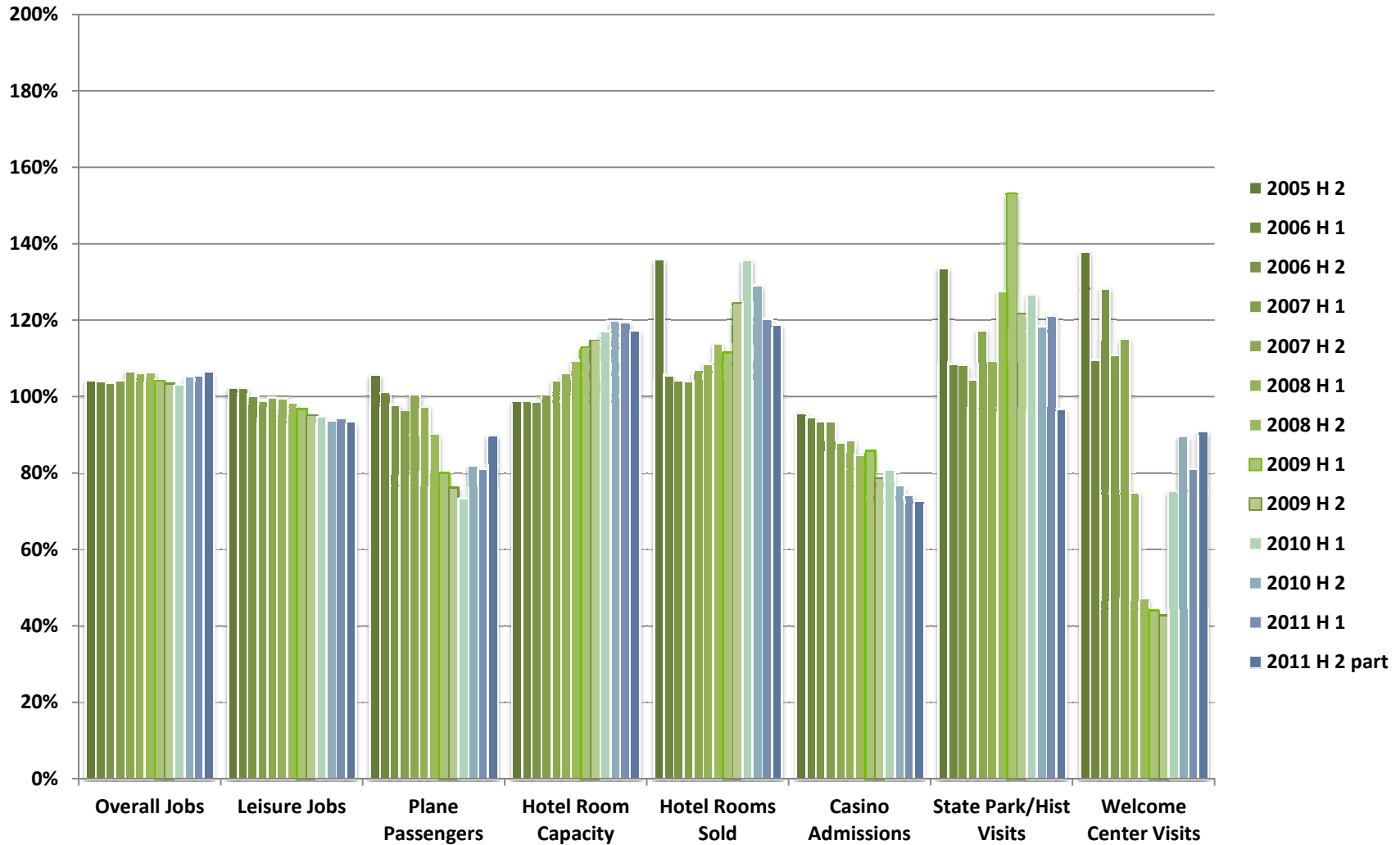
Monroe Half Year Trends



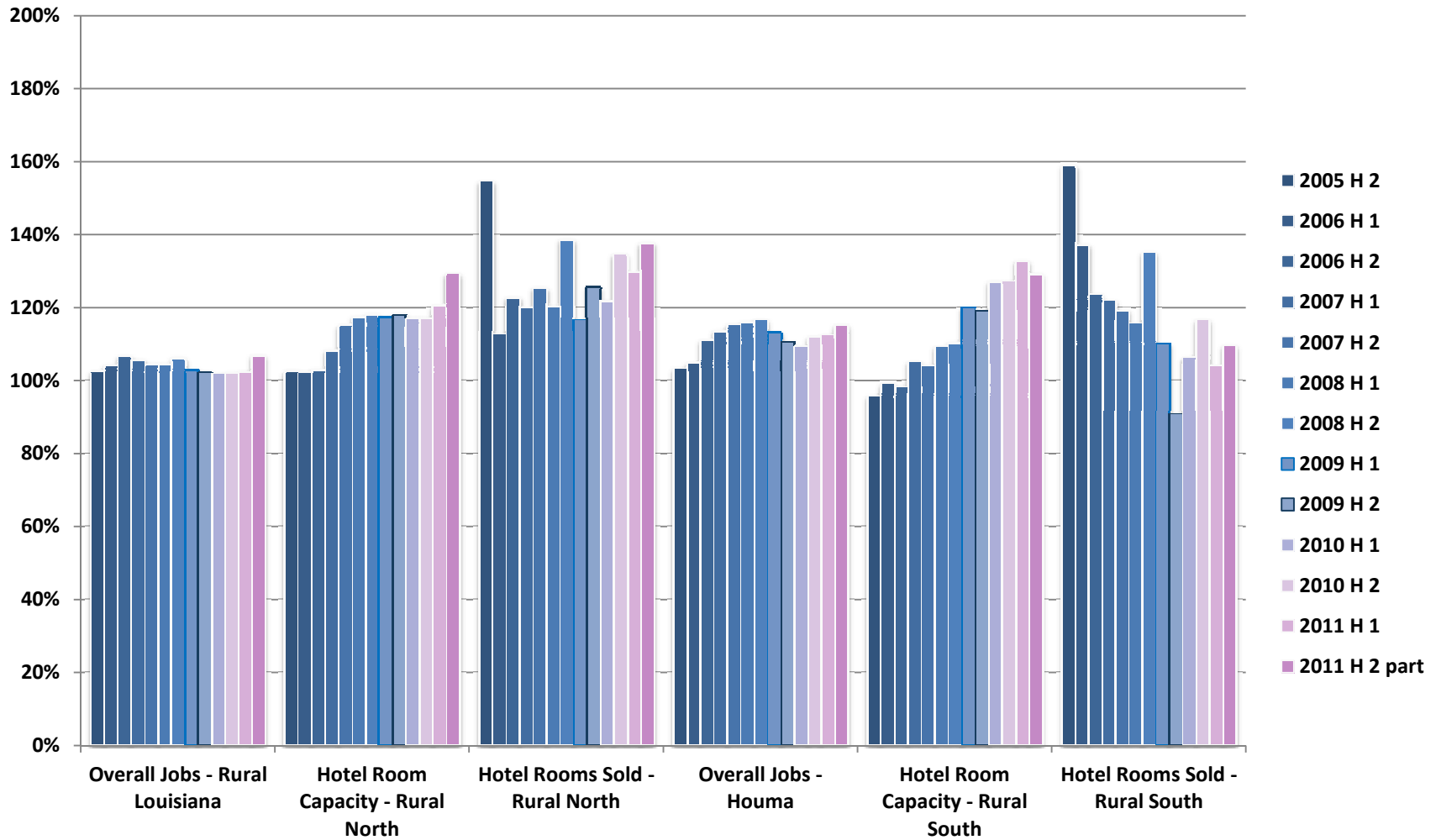
New Orleans Half Year Trends



Shreveport Half Year Trends



Other Areas Half Year Trends



LOUISIANA

All Visitors (Domestic and Foreign)*

Forecast for Louisiana

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Visitors (Millions) ¹	26.2	24.8	19.6	18.2	23.8	24.4	24.0	25.1	24.7	25.2	26.0	26.5
Total Spending (Billions) ²	\$9.4	\$10.0	\$8.2	\$6.6	\$9.0	\$9.5	\$8.8	\$9.6	\$9.4	\$9.9	\$10.5	\$11.0

*All tables include the negative effect of BP oil spill and do not include the payment by BP for additional advertising

¹ Source: 2003-5 TIA in combination with CRT

² Source: 2003-5 Louisiana TSA

Due to rounding, Louisiana totals sometimes do not equal sum.

Underlying Indicators

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Tourism Employment (Thousands) ³	--	165	122	108	143	145	131	142	136	138	143	143
Airport Passenger Enplanements (Millions)	5.7	6.0	5.2	4.5	5.1	5.2	5.0	5.3	5.3	5.5	5.7	5.9
Hotel Room Nights Sold (Millions) ⁴	16.9	17.8	18.9	17.3	16.9	18.2	16.9	18.6	17.9	18.3	18.6	19.1
Convention Room Nights Sold (Millions)	2.7	2.6	2.1	1.2	1.9	2.0	2.2	2.2	2.2	2.3	2.3	2.3

³ Direct employment, includes construction work on infrastructure

⁴ In 2005, 2006 and early fall 2008, many hotel rooms were not attributable to visitors.

Due to rounding, Louisiana totals sometimes do not equal sum.

State Taxes

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Hotel Sales Taxes (Millions) ⁵	\$76	\$61	\$58	\$66	\$73	\$66	\$75	\$73	\$77	\$81	\$86
Non-hotel State Tax Revenue (Millions) ⁶	\$541	\$511	\$495	\$615	\$637	\$598	\$620	\$620	\$653	\$688	\$716
Louisiana Superdome and Exposition Tax (Millions) ⁷	\$34.6	\$28.1	\$24.7	\$26.7	\$29.7	\$27.7	\$31.4	\$30.2	\$32.7	\$34.9	\$37.6

⁵ 4% state sales tax. FEMA residents removed in hurricane periods

⁶ Only state taxes are included

⁷ Source: 2004-10 Louisiana Dept. of Revenue, Orleans and Jefferson parishes only. In 2006, only \$19.8 mil. attributed to visitors. In 2008, only \$27.2 to visitors.

Due to rounding, Louisiana totals sometimes do not equal sum.

Louisiana Tourism Forecast

- New Orleans + Rest of the State = Louisiana
- Overview
 - Visitors
 - Total Spending
- Underlying Indicators
 - Tourism Employment
 - Airport Passengers
 - Hotel Room Nights Sold
 - Convention Room Nights
- State Taxes
 - Hotel Sales Taxes
 - Non-Hotel State Tax Revenue
 - Louisiana Superdome and Exposition Tax

Why Is this Information Useful To Me?

- Monitor Trends
- React to Changes
 - i.e. New Hotel or Airport Capacity
- Provide Information to Legislators
- Seek Grants and Promotion Funds

Thank You.